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## Documents Required for T1 Terminal/T3 Trust

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### What to do Upon Death

1. Notify CRA by calling 1-800-959-8281.
2. Stop payments with respects for GST/HST credit, CCTB and/or universal Child Care Benefits.
3. Notify Service Canada by calling 1-800-622-6232.
4. Certain Payments received after the death must be returned to Service Canada.
5. Provide form [RC4111](#) (What to do following a death to the executor).
6. Guide [T4011](#) (Preparing returns for deceased persons).
7. CRA release [RC4177](#) (Death of an RRSP Annuitant), Discuss the tax implications of RRSP's on death.
8. CRA Release [RC4178](#) (Death of a RRIF Annuitant), including the options available to reduce or defer the tax liability.
9. List of Assets at date of death.
10. Note all RRSP's/RRIF's are taxable at date of death unless there is a surviving spouse.

### Documents Required to Complete Return

- ☐ Death Certificate
- ☐ Will
- ☐ List of Assets on Death
- ☐ Investment market value at date of death for:
  - RRSP
  - RRIF
  - Non-Registered Accounts
- ☐ Investment Income non-registered accounts estimated:
  - CPP
  - CAS
  - Pension income
- ☐ TSlips (will not be released until February/March of year subsequent to death)
- ☐ List of Executors and beneficiaries with addresses and contact information
- ☐ Date of Purchase of Principle residence
- ☐ Cost of Purchase of Principle residence
- ☐ Purchase and Sale of Secondary Property
- ☐ Spreadsheet of renovations for all properties